

Staff search and onboarding procedures

A Checklist for Supervisors

The purpose of this checklist is to assist Student Affairs supervisors with staff search and onboarding procedures when a position, regardless of funding source, has either become vacant or a new position is created. Where departmental approval is required below, the approvers are the direct supervisor, Executive Director, and Assistant or Associate Vice President (if applicable).

- Assess the department needs and review the office's present and future workload. Are the department's needs the same as when the position was first created or have needs changed? Are there alternative ways to deliver the department's programs and services?
- Complete the paperwork necessary to approve position recruitment and posting and submit to Student Affairs approvers. First, obtain all necessary departmental approvals then send to the Executive Director of Finance who will also obtain approval from the Vice President for Student Affairs.
 - Prepare a justification memo to recruit for the position. There is no dedicated form, however, the justification should address the following:
 - Impact of the position on student services;
 - Consequences of not filling the position;
 - Any alternatives considered and why filling the position is the best alternative.
 - Reassess the Job Evaluation and submit an updated a copy.
 - Prepare and submit the Recruitment Request Form.
- Conduct the search according to University guidelines:
 - Assemble a representative search committee to include key constituency groups;
 - Develop selection (candidate screening) criteria;
 - Review resumes to identify qualified applicants;
 - Identify top candidates;
 - Conduct email screen and/or phone interviews;
 - Evaluate email screen to determine who will proceed to the next round of interviews;
 - Schedule interviews;
 - Decide on final candidate;
 - Fax releases to Human Resources for your finalists when they arrive on campus;
 - Check references;
 - Complete Search Summary Form.
- Finalize the search with the selected candidate
 - Submit Search Summary Form with recommended salary to the Executive Director of Finance after obtaining departmental approval.
 - Once authorization to offer the position is given by HR, discuss the parameters of the offer with the candidate.

- If a counteroffer greater than the salary authorized by the Search Summary Form is considered, it must first be submitted to the Executive Director of Finance for approval.
 - Complete Authorization to Make Offer email from Human Resources with salary, start date, supervisor information, work location, phone number, and direct reports (direct reports are key information to include, as time approval is based on this data).
 - Ensure the candidate completes the Personal Data Form and Total Compensation Package that is sent by HR.
- Prepare for employee's arrival
 - SMU ID and email address are established by OIT, but follow up to ensure these are established prior to the employee's arrival.
 - Order business cards and office key if necessary.
 - Submit the following OIT tickets to establish access, if necessary:
 - T drive;
 - V drive;
 - Voicemail, long distance code, and phone number directory update;
 - Administrative Access.SMU permissions;
 - Admin Images;
 - PC/laptop configuration;
 - TimeAccess (biweekly supervisor, and/or set up a monthly delegate approver);
 - SMU financials;
 - Q-drive access;
 - eProcurement.
 - Submit a draft announcement to be distributed to Student Affairs and send to Executive Director of Finance.
 - Request a cell phone if one is necessary under Student Affairs policy.
- Actions to be completed during the first week
 - SMU ID card and parking sticker (directions will be sent to new hire by Human Resources);
 - Online New Employee Orientation Tutorial;
 - Employee Statement signed and delivered to HR;
 - Order a Procurement Card if necessary;
 - Departmental orientation;
 - Provide a job description.
- Actions to be completed during the first 90 days
 - SMU & You mini-orientation;
 - Preventing Sexual Harassment online tutorial (new staff member will submit a certificate of completion to you);
 - Preventing Workplace discrimination online tutorial (new staff member will submit a certificate of completion to you);
 - 90 day performance review (contact Executive Director of Finance if an extension is requested or if you otherwise believe the new staff will not be successful).